

The American FERTILIZER

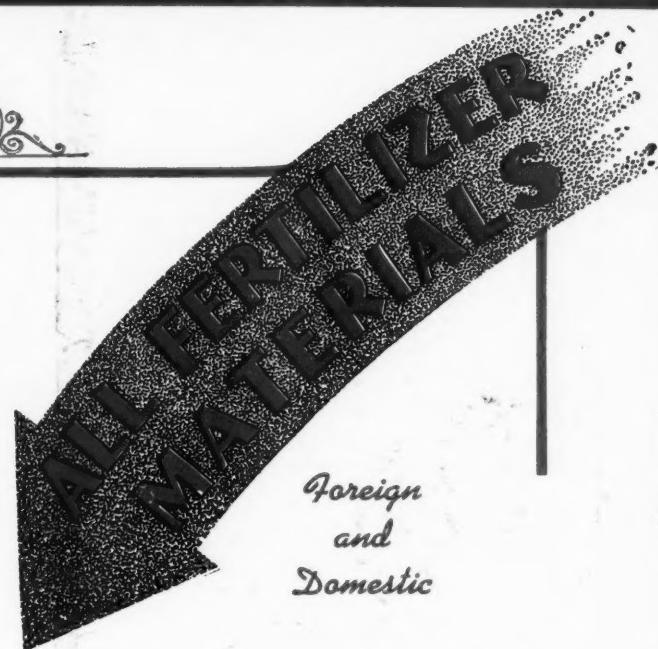


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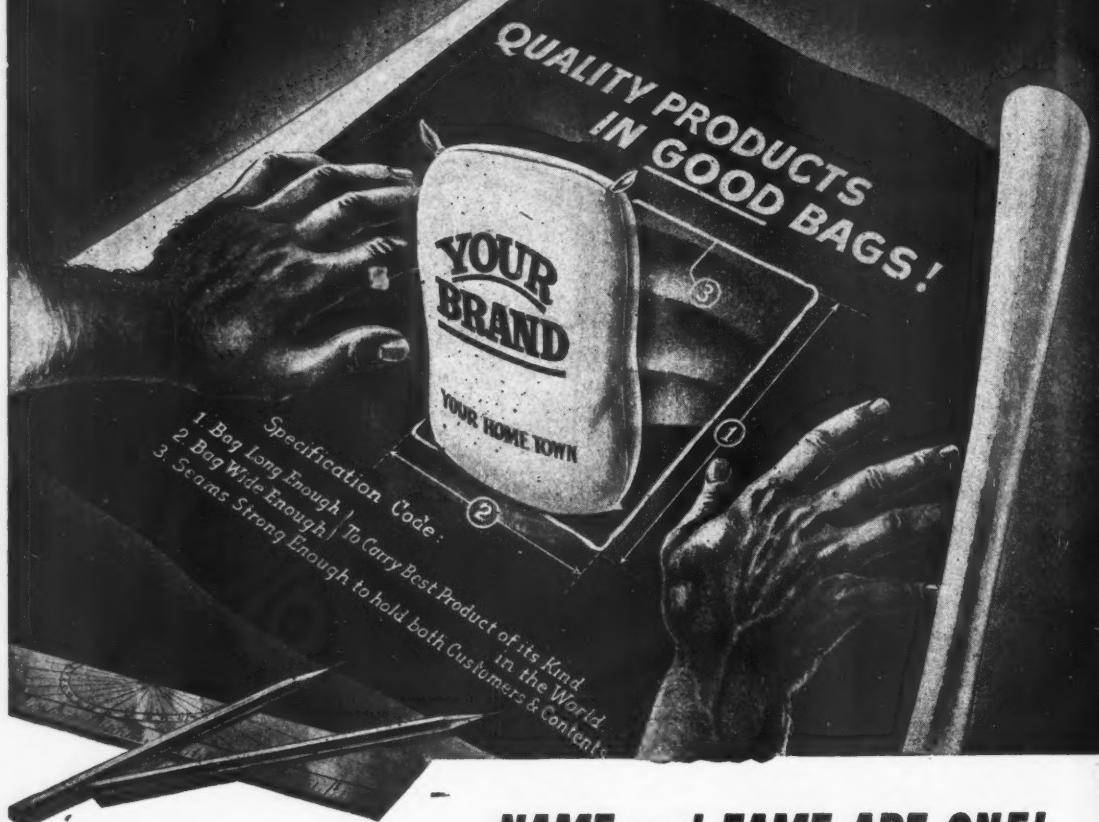


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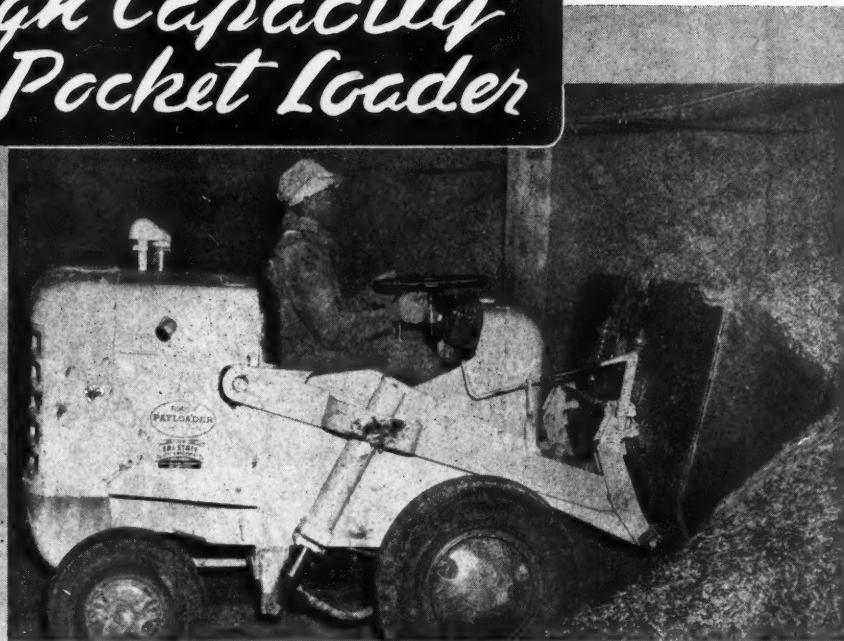
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The American FERTILIZER

Vol. 105

NOVEMBER 30, 1946

No. 11

Past and Future

By WELLER NOBLE

Chairman, Board of Directors, National Fertilizer Association

WHILE figures are not available, it is estimated that for the fiscal year ended June 30, 1946 approximately 15 million tons of fertilizers and fertilizer materials were distributed to our farmers, as compared with an average of 7,150,000 tons distributed annually in the pre-war years 1935-39.

During the past fiscal year we produced 8,037,000 tons of superphosphate basis 18 per cent P₂O₅, which is an increase of 8.2 per cent more than was produced in the preceding fiscal year, and more than double that which was produced in the average of the five pre-war years. These increases have been accomplished largely with existing facilities because of the difficulties and even prohibitions facing new construction. Many new plants are under construction or in the blue-print stage, but labor or materials are scarce or unobtainable, so we must largely depend upon the existing facilities for our output for the spring season.

Seeking inspiration for my address, I reviewed the records of all meetings dating as far back as 1925. There was much data in the discussions of past-presidents of this organization having to do with the "ups and downs" of our Industry, and I might add,—mostly "downs."

In almost every address by the then-president of the organization during the past twenty years, the need for the National Fer-

tilizer Association was stressed, with emphasis placed on progress made by the Association, in sounder business methods, better selling policies, and with particular emphasis on the activities of the Association which has brought about increased yields for all crops through gathering and disseminating data throughout the United States. Each past-president, almost without exception, emphasized each year a situation amounting almost to a crisis which called for a strong organization. Whether this took the turn of government entry into competition with industry, or depressed prices for crops which seriously affected the producer or customer, or serious over-production of fertilizers, Industry's Association was expected to take the leading role in an attempt to solve such problems.

I am proud of the record of achievement of our Association and hope that during my term of office members of our staff will be able to appear more frequently in our programs to outline the part they have played and continue to play in the dissemination of better knowledge and use of fertilizers which has contributed so much to the enormous production of crops in the United States of recent years at a time when large crops were so badly needed.

Through necessity, there has been for the past five years a very close cooperation between Government, Industry, and Agriculture. By virtue of this cooperation, fertilizers produced maximum yields of those crops most needed in the war effort. Although

*From an address before the Southern Convention of the National Fertilizer Association, Atlanta, November 12, 1946.

even at this date supply has not matched demand, the production of fertilizers has more than doubled during these years. On the favorable side, in my judgment, through the use of Victory Garden Fertilizers and the attendant publicity and also by the publicity given to the increased yields in crops needed so badly for the war effort, our industry has profited immeasurably in that, throughout the United States, our citizens have almost universally become conscious of the value of fertilizers and there has been a wider distribution of all types of fertilizer than at any time in our history.

While distributing the largest volume of fertilizers per annum in our history, due to the fact that demand has been somewhat greater than supply, the past four years have been reasonably profitable and will continue to be, if we conduct our business along sane and sensible lines.

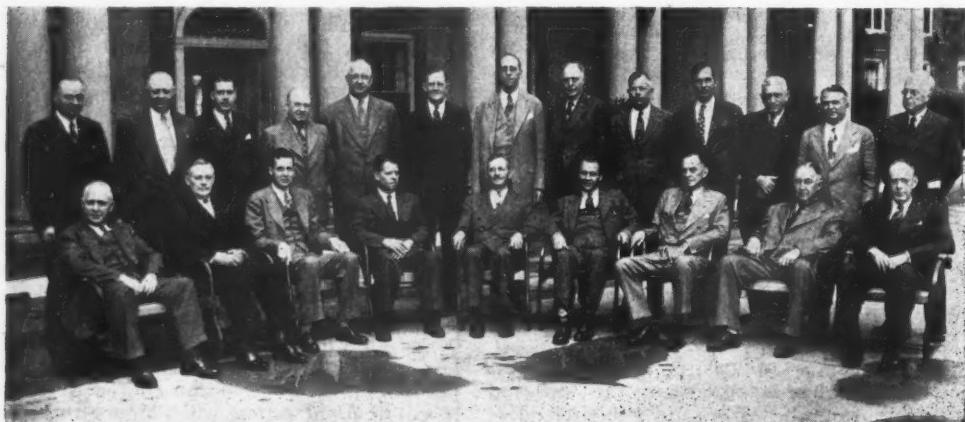
On the unfavorable side, it is certainly apparent to all that many farm products will be in surplus supply in the near future. This will depress prices and undoubtedly curtail purchases of fertilizers. This curtailment is likely to take place about the time the fertilizer industry is prepared to provide a record-breaking tonnage. The result will prove disastrous if industry does not follow an orderly form of marketing.

The U. S. Department of Agriculture estimates that for 1946 there will be an increase of 10 per cent above the all-time-high farm cash income of \$21,720,000,000 received in 1945, or an income of \$23,892,000,000. Their predictions for 1947 show a decline of from 5 to 15 per cent, depending upon various fluctuating factors, and this decline might be well above the maximum of 15 per cent. Prices currently received by farmers for their products are about $2\frac{3}{4}$ times their 1910-14 average prices, while the prices they pay for their fertilizers are only $1\frac{1}{4}$ times prices they paid in the same period. Naturally, under such conditions, farmers, realizing the value of fertilizers, have greatly increased their purchases and will continue to do so as long as this comparison exists.

For at least four years it has been difficult to find material to supply the farmers' demand. In the period that lies almost immediately ahead, it will be difficult to find the customers who will purchase the surplus fertilizers which undoubtedly will be produced.

We have had in past years a number of Codes or rules of procedure, most of which have been discarded, and none of which was ever followed too closely. I should like to offer a new Code, well known to all of us and which, if followed, will have a profound in-

(Continued on page 26)



Board of Directors, National Fertilizer Association

Front Row, left to right: J. E. Powell, E. S. Russell, C. T. Prindeville, L. H. Davis, Weller Noble, Chairman; R. L. King, H. B. Baylor, F. N. Bridgers, H. A. Parker. Back Row: S. F. Elwood, J. H. Epting, M. G. Field, C. D. Shallenberger, C. R. Martin, J. A. Miller, M. H. Lockwood, President; J. W. Dean, J. A. Chucka, L. D. Hand, Lionel Weil, J. E. Totman, R. S. Cope. Not in Photograph: W. H. Gordon, E. B. Helgeson, W. Newton Long, M. W. Whipple

The World Fertilizer Position*

BY DR. OLIVER E. OVERSETH

Secretary, Committee on Fertilizers, International Emergency Food Council, Food and Agriculture Organization of the United Nations, Washington, D. C.

IN JULY, 1942 the President of the United States and the Prime Minister of the United Kingdom set up the Combined Food Board with terms of reference "To co-ordinate further the prosecution of the war effort by obtaining a planned and expeditious utilization of the food resources on the United Nations." The Committee on Fertilizers was established by the Combined Food Board and I was appointed as Secretary. Except for a brief assignment with the Foreign Economic Administration and a visit to England and continental Europe, I have served in the capacity of Secretary since August, 1942.

During the War there were three members of the Committee, viz., the United Kingdom, Canada, and the United States. When the Combined Food Board ceased operations in June, 1946 and the International Emergency Food Council took over its duties, the Committee increased its membership to include Belgium, Chile, Denmark, France, India, the Netherlands, Norway, and a joint membership for Australia and New Zealand. Included with attendance at all meetings are representatives of Food and Agriculture Organization and the United Nations Relief

and Rehabilitation Administration. The following information on the world fertilizer output, while presented with the authorization of the Committee on Fertilizers, represents the personal view of the speaker.

In spite of the devastating effects of the Second World War, the world production of commercial fertilizers has increased from 7,600,000 to 9,324,000 metric tons actual nitrogen, P_2O_5 , and K_2O . While nitrogen production has decreased in Japan and continental Europe, it has increased in North America and Great Britain. Although the phosphate rock from Ocean and Nauru Islands has been greatly reduced, the supplies available for world distribution from the United States and French North Africa have greatly increased. German potash is recovering from war disruption and the supplies in France and the United States have greatly increased over wartime and pre-war production. In spite of these increases there is a significant and critical shortage of all fertilizer materials today.

We will now briefly examine the extent of the shortage of nitrogen, phosphates, and potash.

Nitrogen

The world shortage of nitrogen is much more serious than the shortage of any other plant nutrient. From stated requirements as



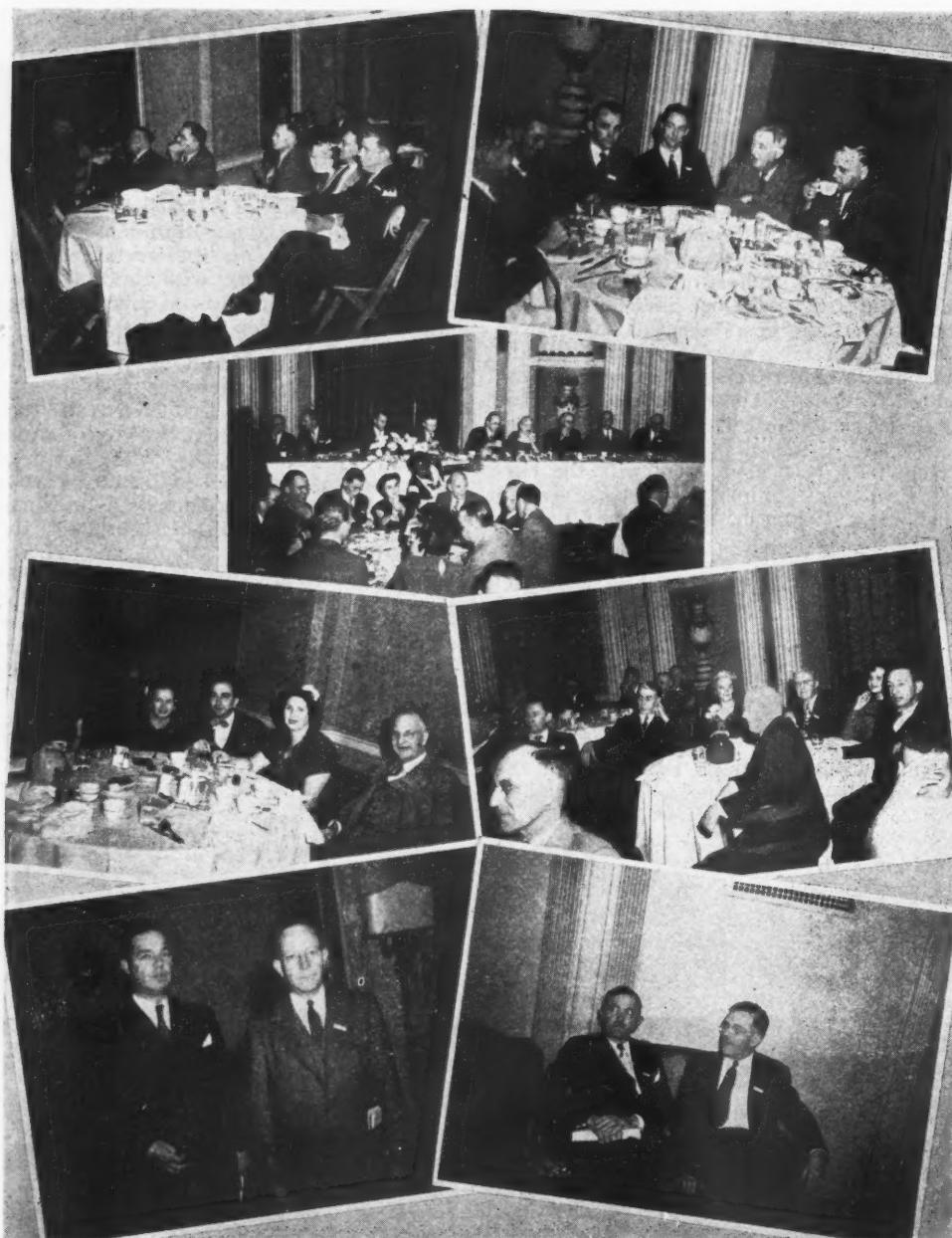
Dr. L. D. Baver, Raleigh, N. C.; Dr. M. J. Funchess, Auburn, Ala.



J. E. Totman, Baltimore, Md.; M. M. Keim, CPA, Washington, D. C.



O. E. Overseth, Washington, D. C.; L. G. Porter, Washington, D. C.



Convention Scenes

Upper left: W. C. Rider, Roy M. Howe, J. A. Chucka, C. G. Schenck, C. T. Crandall. Upper right: N. Bryant Cooper, C. L. Straughan, Kinchen O'Keefe, Howard Wiggins, F. N. Bridgers, Joe E. Brewer. Center: The Annual Banquet, Speakers' Table. Center left: Mrs. Burton A. Ford, Mr. and Mrs. H. S. Ten Eyck, G. W. McIntosh. Center right: W. S. Ritnour, M. S. Hodgson, Mrs. and Mr. J. C. Mooar, Mrs. and Mr. C. P. Belding, J. F. Benton. Lower left: F. T. Techter, R. S. Marsden. Lower right: Weller Noble, R. H. Engle

submitted by over 100 countries, the world shortage of nitrogen is about 30 per cent or approximately 842,000 metric tons, equivalent to nearly 4,200,000 tons ammonium sulphate. Minimum requirements for Germany, Japan and South Korea are included in these figures and represent a large import demand for two countries previously considered as major producing countries before the war and, in the case of Germany, a substantial exporter of nitrogen.

This shortage, while affecting all countries, is especially acute in continental Europe, Asia and the Far East. It is in some of these countries where fertilizers have been relied on to produce minimum supplies of foodstuffs essential to prevent actual starvation, that food shortages are severe.

have been used in the past. Japan has been the leader in consumption of nitrogen and phosphates and accounts for about 80 per cent of the amount used. China and Formosa have used small quantities but are awaking to the importance of fertilizers in their food economy and present important markets. India considers that large quantities of commercial fertilizers would alleviate the acute food shortage position and with large areas of irrigated lands in rice she could reduce the starvation of millions of her population.

With hand labor and intensive cultivation on limited land resources, a unit of fertilizer produced more actual food for direct consumption than in many other parts of the world. In spite of the primitive methods of cultivation these peoples, to exist, must prac-



Panel on Legislative Outlook

Weller Noble, R. L. King, J. H. Epting, C. T. Prindeville, Bert C. Goss, M. H. Lockwood

In continental Europe coal is the most critical raw material necessary for the manufacture of nitrogen. The nitrogen output is directly related to the amount of coal available. It is fully recognized that the number one problem in Europe's industrial reconstruction is coal. It may thus be concluded that there will be an acute nitrogen shortage in many parts of Europe so long as the coal problem remains.

Even during the war, reports that stable manures in all European countries were reduced both in quantity and quality constantly reached Washington. These countries have a reputation of husbanding all manures and refuse and carefully returning them to the soil. Because of the decrease in livestock population and imported feeds customarily used, the amount of plant food added or returned to the soil was in many cases cut in half. Now these countries require larger amounts of commercial fertilizers to again restore them to the state of fertility essential for satisfactory crop production.

In Asia and the Far East comparatively small quantities of commercial fertilizers

tice economy in the use of fertilizer materials.

In comparison with pre-war production of nitrogen, with the exception of continental Europe, there has been an increase in the output of nitrogen for fertilizer use. The Western Hemisphere has substantially increased its nitrogen production, as is also true of the United Kingdom. The decrease in continental European production of about 290,000 metric tons nitrogen still leaves the world with a net increased output estimated at 227,000 tons of nitrogen for the current fertilizer year as compared with pre-war.

The European nitrogen deficit is caused chiefly by the postwar reduction in German production, down from a three-year average for 1936-39 of 677,000 metric tons to an estimated production for 1946-47 of 318,000 metric tons. The only nitrogen-exporting countries in continental Europe today are Norway and Belgium. All the others are importing countries with the larger requirements for France, the Netherlands, Denmark, Poland, Italy, Sweden, and Spain. Egypt

(Continued on page 20)

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N.F.A. Fall Convention

The National Fertilizer Association held a very successful fall convention in Atlanta, Ga., on November 11th, 12th, and 13th. More than 275 executives of fertilizer and material manufacturing companies, equipment houses, agronomists and government fertilizer officials were in attendance.

At the first general meeting on November 12th the activities of the association were reviewed by President M. H. Lockwood, Chairman Weller Noble and the staff.

Following a talk on post-war agricultural problems by Dr. M. J. Funchess of the Alabama Agricultural Experiment Station, the balance of the session was devoted to a panel discussion on the legislative outlook, led by C. T. Prindeville, Chairman of the National Fertilizer Association Public Relations Committee.

"While it seems certain that the objectionable fertilizer bills would be re-introduced in the 80th Congress, the outlook under an efficiently conducted public relations program is not as discouraging as it might first appear," said Mr. Prindeville.

"We can, if we will, overcome our disadvantage in numbers by the soundness of our position and the intelligence with which we make this sound position known to the public, large segments of which will become our allies when they understand. This was demonstrated in the defeat of the TVA fertilizer plant in the last Congress."

Other members of the panel emphasized the need of cooperating with other groups such as feed and farm implement manufacturers, who would be affected by this fertilizer legislation. Agents and dealers are another great potential in bringing to the public the facts about the industry. Members were urged to address local civic groups and see that the local press is kept informed on the subject.

The session on Wednesday, November 13th, covered such subjects as "The Revolution in Agriculture in the Mid-South," by W. C. Lassetter, editor of *The Progressive Farmer*; "Science Remaking the South," by Dr. L. D. Bauer, of the North Carolina Experiment Station; "Our Car Supply Problems," by C. R. Megee, of the Railroad Association; "The Situation with Respect to Fertilizer Supplies," by Dr. O. E. Overseth and L. G. Porter, whose addresses are published in full in this issue.

Fertilizer Supplies for the United States During the 1946-47 Season*

BY L. G. PORTER

Chief, Fertilizer Division, Materials and Equipment Branch, Production and Marketing Administration, U. S. Department of Agriculture

IN DISCUSSING the outlook for nitrogen, phosphate, and potash for domestic agriculture during the current season, it may be well to devote only a limited portion of the assigned time to phosphate and potash and give more time to the nitrogen picture since it is more complex and confused.

For the 1946-47 season the United States supply of soluble phosphates, as agreed to within the International Emergency Food Council, compared with the 1945-46 program is as follows:

| PHOSPHATE SUPPLIES IN SHORT TONS OF P ₂ O ₅ | | |
|---|--------------------|--------------------|
| | 1945-46 Program | 1946-47 Program |
| U. S. Production..... | 1,430,000 | 1,554,000 |
| Imports | | |
| Canada..... | 30,000 | 27,300 |
| Total U. S. Supply..... | 1,460,000 | 1,581,300 |
| Exports Approved by Combined Food Board..... | 55,000 | 56,800 |
| Net Supply for U. S. and Possessions..... | 1,405,000 | 1,525,500 |

EXPORT ALLOCATIONS FOR 1946-47 Phosphates

| | Tons |
|-------------------------------|--------|
| Canada..... | 26,400 |
| Iceland..... | 200 |
| Kenya..... | 1,400 |
| Philippines..... | 1,700 |
| British West Indies..... | 700 |
| UNRRA Countries..... | 5,500 |
| Latin-American Republics..... | 20,900 |
| | 56,800 |

Currently, production of normal superphosphate is running about 2 to 3 per cent behind schedule, due largely to boxcar shortages at the mines and an inadequate supply of sulphuric acid in the Southeast. (We are happy to report that the negotiations for the lease of the sulphuric acid plant at Alabama Ordnance Works are near consummation and are hopeful that acid from the plant can be expected to move within the near future.) A recent review of the soluble phosphate situation gave no grounds at the present time for a revision of the preliminary estimate of production for the current season.

You are all familiar with the score on potash. According to a recent release of the Civilian Production Administration:

Allocation of the 795,880 tons of domestic potash (K₂O) available for distribution from June 1, 1946 through March 31, 1947 (Period Eight) has been completed with the apportionment of 35,606 tons to new or expanded fertilizer plants and a supplementary allotment of 7,566 tons to established Midwestern plants.

The allocation of potash, suspended September 30, 1945, was resumed June 1st, under Schedule 120 of Order M-300. Distribu-

(Continued on page 24)

*An address at the Southern Convention of the National Fertilizer Association, Atlanta, November 13, 1946.



N. F. A. Officers and Staff

M. H. Lockwood, President; D. S. Murph, Secretary and Treasurer; Weller Noble, Chairman of the Board; R. H. Engle, Agronomist; W. S. Ritnour, Assistant Treasurer

October Tag Sales Increase

Fertilizer tax tag sales rose sharply in October, 1946, according to the compilation of the National Fertilizer Association. Totaling 584,000 equivalent short tons, October sales were 35 per cent above those of October, 1945, and were about four times greater than the average of the October 1935-39 sales.

There was a 38 per cent increase in the Southern States with increases in each of the 11 States except Oklahoma where the relative tonnage was small. Increases in Mis-

souri and Kansas more than offset declines in Indiana, Illinois and Kentucky, with a 10 per cent net increase registered in the Midwestern States.

For the first 10 months of the calendar year, January through October, fertilizer tag sales continued the upward trend of the past months. Tag sales aggregated 7,819,000 equivalent short tons in the 16 States, and were 15 per cent higher than in the comparable period of 1945 and 30 per cent higher than two years ago.

FERTILIZER TAX TAG SALES JULY through OCTOBER

| | 1946 | 1945 | 1944 |
|--------------------------|-----------|-----------|-----------|
| 11 Southern States..... | 1,354,150 | 982,346 | 719,730 |
| 5 Midwestern States..... | 524,120 | 372,791 | 306,875 |
| Total—16 States..... | 1,878,270 | 1,355,137 | 1,026,605 |

FERTILIZER TAX TAG SALES COMPILED BY THE NATIONAL FERTILIZER ASSOCIATION

| STATE | OCTOBER | | | JANUARY-OCTOBER | | | |
|---------------------|--------------|--------------|--------------|-----------------|--------------|--------------|--------------|
| | 1946 Tons | 1945 Tons | 1944 Tons | % of Tons | 1946 Tons | 1945 Tons | 1944 Tons |
| Virginia..... | 48,942 | 32,466 | 31,498 | 112 | 596,074 | 531,716 | 449,646 |
| North Carolina..... | 88,321 | 60,906 | 30,585 | 108 | 1,370,372 | 1,268,756 | 1,120,304 |
| South Carolina..... | 56,985 | 33,280 | 22,670 | 108 | 781,020 | 725,260 | 657,793 |
| Georgia..... | 71,970 | 59,854 | 36,794 | 103 | 1,018,159 | 989,702 | 920,463 |
| Florida..... | 130,056 | 125,542 | 60,821 | 119 | 854,288 | 716,470 | 642,530 |
| Alabama..... | 33,500 | 16,400 | 16,500 | 115 | 766,050 | 665,500 | 588,350 |
| Tennessee..... | 26,940 | 19,975 | 17,852 | 114 | 304,634 | 267,202 | 247,371 |
| Arkansas..... | 4,500 | 3,200 | 2,500 | 125 | 141,550 | 113,400 | 110,583 |
| Louisiana..... | 32,300 | 6,024 | 2,375 | 110 | 232,718 | 213,510 | 203,295 |
| Texas..... | 26,251 | 16,940 | 8,365 | 164 | 314,083 | 191,855 | 170,714 |
| Oklahoma..... | 1,960 | 2,950 | 500 | 228 | 50,936 | 22,312 | 17,351 |
| Total South..... | 521,725 | 377,537 | 230,460 | 113 | 6,429,884 | 5,705,683 | 5,128,400 |
| Indiana..... | 19,875 | 26,566 | 5,896 | 125 | 511,617 | 408,606 | 339,443 |
| Illinois..... | 8,050 | 11,750 | 13,200 | 126 | 274,603 | 218,514 | 153,090 |
| Kentucky..... | 13,650 | 14,905 | 6,710 | 111 | 291,641 | 262,146 | 229,709 |
| Missouri..... | 14,219 | 1,388 | 2,399 | 172 | 251,978 | 146,634 | 135,001 |
| Kansas..... | 6,875 | 2,310 | 200 | 161 | 58,863 | 36,615 | 37,696 |
| Total Midwest..... | 62,669 | 56,919 | 28,405 | 129 | 1,388,702 | 1,072,515 | 894,939 |
| Grand Total..... | 584,394 | 434,456 | 258,865 | 115 | 7,818,586 | 6,778,198 | 6,023,339 |

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FERTILIZER MATERIALS MARKET

NEW YORK

Some Increases Noted in Fertilizer Materials. Coal Strike Affects Sulphate of Ammonia Supply. Practically No Organics Available for Fertilizer. Heavy Demands for Phosphate Rock But Mining Equipment Scarce.

Exclusive Correspondence to "The American Fertilizer"

Interest in the fertilizer materials market at this time is centered on the possibility of additional price increases and speculation as to the duration of the coal strike, and its effect on supplies of domestic nitrogen. Several Florida producers of phosphate rock have recently advanced their price basis, and it is felt that other producers will do likewise in the near future. The basic agricultural chemicals, such as ammonium sulphate, potash salts and nitrate of soda, are holding firm at previously established levels, but there is some possibility of an adjustment upward on the latter material. The overall picture shows continued firmness with reasonable price increases anticipated on some materials.

The demand for organics of all types has become increasingly heavy from both the larger and smaller fertilizer manufacturers, and such items as dried blood and tankage have been taken when available at the recently established high price levels. It is increasingly apparent that the fertilizer industry will be forced to do without even minimum requirements of organics in their mixtures.

Sizable exports are to be noted during this reporting period, a large proportion of which is accounted for by shipments of ammonium nitrate moving through government channels. Imports of fertilizer materials remain at low levels compared with pre-war years, but offerings of foreign materials have increased considerably during the past month. Foreign price ideas, however, are still considerably above domestic markets.

Sulphate of Ammonia

The already short supply position of this material is being aggravated by the coal strike, and producers' stocks will soon become depleted unless settlement of this labor dispute is made at an early date. Shipment of ammonia liquors has also been cut back as a result of the same conditions in the steel industry.

Nitrate of Soda

The situation in this market has not changed, with both domestic and imported material under heavy call and stocks unable to take care of demand. It is felt that the recent advance on soda ash will be reflected in the price of this material before very long.

Organic Materials

The market remains very strong with increased prices to be noted on bone meal, both feeding and fertilizer grades, nitrogenous tankage, and castor pomace. Offerings have been limited and supplies reluctantly taken at current high levels when available.

Superphosphate

Production of normal superphosphate shows a small increase over recent months, but remains below production figures for this time last year. Production of concentrated superphosphate shows a small percentage increase, but demand remains far above current capacities. The movement of both grades has been hampered by continuing boxcar shortages in most areas.

Phosphate Rock

Demand continues to hold at record levels and the supply situation does not appear to have eased. Increased productive capacity of one major producer has not materialized as yet, due to problems in obtaining mining equipment. Buying interest from abroad has become increasingly heavy.

Potash

No change in price structure appears imminent at this time, but there is speculation as to how long the government allocation program may be in effect. Movement of this material from production points to fertilizer manufacturers is unusually heavy for this time of year, and is holding up in spite of increasing transportation difficulties.

NOVEMBER



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In November and in all the other months of the year Raymond Multi-Wall Paper Shipping Sacks protect your fertilizer, ensuring the safe delivery of your product. Raymond Shipping Sacks are specially designed for fertilizer. They are sift-proof, dust-proof, and water-resistant; their Multi-Wall construction offers protection from snags and tears. CUSTOM BUILT in many strengths, types, and sizes, Raymond Shipping Sacks are made with valve or open mouth, pasted or sewn, printed or plain. They are tough, strong, and dependable; they deliver all the goods all the way.

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PHILADELPHIA

Demand Continues. Organics Prices Higher.
More Imported Nitrate of Soda Expected.
European Potash Output Increasing.

Exclusive Correspondence to "The American Fertilizer"

PHILADELPHIA, November 25, 1946.

There is still great demand for raw fertilizer materials of all kinds, and organics remain scarce with prices much higher.

Sulphate of Ammonia.—Market remains in tight position with demand active and ahead of supply. Continuation of the coal strike will have a serious effect on production.

Nitrate of Soda.—Demand is somewhat in excess of normal for this season. Domestic production prospects depend a great deal upon the uncertain position of soda ash. Imports are expected to increase after the first of the year, and it is a question whether much significance attaches to the report that Chile has increased this year's quota to Spain by one hundred per cent over last year.

Castor Pomace.—There has been better movement in this article and while it was published that there had been an advance of \$1.35 per unit, bringing the price to \$4.50 per unit of ammonia (\$5.47 per unit N), business is reported as having been actually done at over \$37.00 per ton, indicating \$5.25 to \$6.00 per unit (\$6.38 to \$7.30 per unit N), depending upon the analysis.

Blood, Tankage, Bone.—Prices continue high with offerings not too plentiful. Blood and takage find fairly ready sale to some fertilizer mixers at an average of \$10.00 per unit of ammonia (\$12.15 per unit N). Bone meal is scarce and prices are slightly higher.

Fish Scrap.—Fishing in this territory is reported suspended, with offerings very limited and prices higher. Meal has been quoted at \$150.00 to \$160.00 per ton, and scrap at \$140.00 to \$150.00.

Phosphate Rock.—Market continues tight with much more inquiry than can be satisfied at this time.

Superphosphate. — Demand continues for additional quantities over existing contracts and no new business is being solicited.

Potash.—Production continues against contracts and distribution is under allocation. Many mixers continue to be short and inquiry is very active. European production is increasing, but it remains to be seen whether this will reflect any benefit to our mixers here.

CHARLESTON

Advance in Fertilizer Prices Expected To Be Limited. Car Shortage Continues. Peed Material Prices Advance Sharply.

Exclusive Correspondence to "The American Fertilizer"

CHARLESTON, November 22, 1946.

Prices of fertilizers and fertilizer materials are expected to rise as a result of price decontrol, but producers of major ingredients are anxious to show no sharp increases. All materials remain short of demand.

Organics.—South American organics remain above domestic prices, with blood quoted about \$11.00 (\$13.37 per unit N), c.i.f. Atlantic or Gulf ports. Domestic views are about \$10.00 to \$10.50 (\$12.15 to \$12.76 per unit N), f.o.b. Chicago, which interests few fertilizer manufacturers. Ground animal tankage is quoted at \$10.50 (\$12.76 per unit N), f.o.b. Chicago. European organics remain unobtainable.

Bone Meals.—Four and one-half ammonia and 45 per cent B.P.L. South American bone meal is reported at about \$76.50, c.i.f. Atlantic or Gulf ports. Some other offerings of South American bone meals have been reported slightly higher. One and 65 per cent bone meal ranges from \$75.00 to \$80.00, f.o.b. Chicago.

Tankage. — Trading is quiet at figures

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DOMESTIC

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Anhydrous Ammonia

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around \$10.50 (\$12.76 per unit N), f.o.b. Chicago or New York. South American is a bit higher.

Fish Meal and Scrap.—Sardine meal on the West Coast has been sold at \$184.20 per ton for 67 per cent protein material, basis f.o.b. production point. Menhaden meal on East Coast sold recently at \$155.00 to \$165.00 per ton, bagged, for 60 per cent and 65 per cent grades, f.o.b. Eastern producing plants. Fish scrap is quoted at about \$145.00 for dried 60 per cent, bulk, f.o.b. East Coast points.

Nitrate of Soda.—On account of soda ash shortage, domestic production is sharply curtailed. Imports are behind last year's figures.

Sulphate of Ammonia.—Supply remains far behind demand with prices still at \$30.00 per ton at the ovens.

Superphosphate.—This material remains short of demand on account of the car shortage for hauling phosphate rock and also on account of the shortage of sulphuric acid. Now that ceilings are off of fertilizer materials, the price may advance a bit, but it is expected the increase in price will be held to a minimum by producers.

Phosphate Rock.—Shipments from Florida mines are running about 55 to 60 per cent of customers' orders on account of car shortage. Supply situation is improved, but cannot be moved as desired. Since lifting of OPA ceilings, the prices on Florida Rock are expected to be increased about 44 cents per ton to take up amount producers have been absorbing in the way of increased labor and oil costs.

CHICAGO

Fertilizer Organics Available in Short Supply at Increased Prices. Feed Materials Market Confused.

Exclusive Correspondence to "The American Fertilizer"

CHICAGO, November 25, 1946.

Since the removal of the OPA ceilings of organic ingredients, prices have fluctuated variously.

Fertilizer tankage and nitrogenous moved at \$6.00 per unit ammonia (\$7.29 per unit N), f.o.b. shipping point. Quantity sold was comparatively light, supply being small but demand was strong. A greater tonnage could have been sold had it been available.

The feed market is still confusing as some of the producers have reduced their asking price while others are holding steady and not taking any orders except from old customers. Wet rendered tankage and blood are quoted from \$9.00 to \$10.00 per unit ammonia (\$10.94 to \$12.15 per unit N), f.o.b. production point.

CASE HISTORY No. 10

One in a series of factual experiences of a group of American manufacturers with Multi-wall Paper Bags.

COST COMPARISON

(Per Ton)

| | Burlap Bags | Paper Bags |
|-------------------------------------|-------------|------------|
| Container cost . . . | \$2.18 | \$1.70 |
| Labor cost | .55 1/2 | .30 1/2 |
| Total bag and | | |
| labor cost | \$2.73 1/2 | \$2.00 1/2 |
| Saving, paper over fabric | | 73¢ |

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BIRD'S EYE VIEW OF PACKAGING EFFICIENCY

Up to 1940, I. P. Thomas and Sons Co., of Camden, N. J., packed its mixed fertilizers in 167-lb. open mouth burlap bags.

At each of the three packing units in its Paulsboro, N. J., plant, eleven men were required to fill, check-weigh, and then sew the bags closed. The packaging output per unit averaged 18 tons an hour.

Realizing in 1941 that burlap might become scarce, the company installed three 160-FB St. Regis Packers and changed over to Multiwall paper valve bags. With this

equipment as a basis, the company put into operation the highly efficient St. Regis Packaging System shown in the illustration.

HERE'S HOW IT WORKS—One man operates the St. Regis Packer, shown at left, which simultaneously weighs and fills the bags. A conveyor carries the factory-closed paper bags to a scale where they are check-weighed and then stacked on pallets. Fork lift trucks take the pallets to storage, to freight cars, or to waiting trucks. The entire operation is simple, compact, and efficient.



Here are the results—

PRODUCTION INCREASED 38%

—Packaging output per unit jumped from 18 tons an hour under the old system to 25 tons an hour with the St. Regis Packaging System.

LABOR COSTS PER TON CUT 45%

—Only eight men (four of whom are shown in photo)

are required for each packing unit, instead of eleven under the old packaging system.

CONTAINER COSTS REDUCED 25%

—Multiwall paper bags cost \$1.70 for each ton packed . . . 167-lb. burlap bags cost \$2.18 per ton.

CUSTOMER ACCEPTANCE—Paper bags protect against caking of contents—a problem often experienced with the use of burlap bags. And customers find 100-lb. Multiwalls easier to handle than bulky 167-lb. burlap bags.



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Without obligation, please send me full details regarding "Case History" No. 10, outlined above.

NAME _____

COMPANY _____

ADDRESS _____

THE WORLD FERTILIZER POSITION

(Continued from page 11)

and India as well as China and Formosa have large import requirements.

To sum up the nitrogen position, the evidence strongly indicates that, while it is far from pleasant, many countries will have to produce their crops in 1947 with 36 to 60 per cent of their necessary nitrogen requirements. The significant point is this: the prospective total tonnage of nitrogen available for the world crops in 1947 is insufficient to produce maximum yields. It is inevitable that some countries will produce poorer crops because there is not enough nitrogen.

Phosphates

The world supply of phosphate rock is more nearly up to world demand than is the supply of soluble phosphates. The shortage of soluble phosphates is more severe because the facilities for processing the available rock are not sufficient to meet the demand. Therefore this discussion notes mainly the soluble phosphates.

The world shortage is estimated at approximately 1,100,000 metric tons P₂O₅. This shortage is largely in continental Europe

where war damage has interrupted processing facilities and transportation. Europe has always been dependent upon French North Africa for phosphate rock and this supply now nearly meets requirements. The bottlenecks in the production of soluble phosphates in Europe are inland shipping, facilities to produce the phosphates, and lack of sufficient coal. Sulphuric acid manufacture depending on pyrites and sulphur is also a problem.

The supply of soluble phosphates in North America is relatively adequate. The production of ammonium phosphates in Canada is being maintained at war levels.

In addition there are approximately 500,000 tons of ground phosphate rock to be applied directly to the soil in Europe and North America this year. Basic slag, once of real significance in European agriculture, is currently of much less importance, limited to production in England, Belgium and Germany. Pre-war European production was slightly more than five million tons of basic slag while now it will be only about 25 per cent of this amount. Prior to the war, basic slag was considered the cheapest source of phosphorus for the central European countries and you can realize the position they are in now. Germany, especially in pre-war,



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See page 27

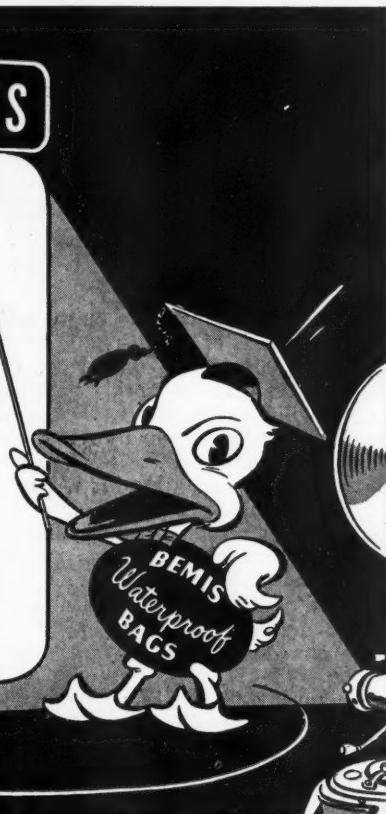
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Scenario: Ferdinand Fertilizer is a high-class fellow...a skilled workman. He's a "special fertilizer" employed by gardeners, nurseries, golf courses, etc. This important fellow must arrive at work in tip-top condition. If Ferdinand allows his clothes to become torn or soaked with rain, he's ruined. He looks and looks for the right clothes to wear, and then...

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had processing facilities for only about half a million tons of phosphate rock because in addition they used over $2\frac{1}{2}$ million tons of slag. On the other hand, Belgium and the Netherlands had superphosphate facilities for exporting this material which are now a life-saver for that part of Europe.

In the Pacific currently the chief enterprise is the effective rehabilitation of the production of phosphate rock on Ocean, Nauru, and other islands.³¹

Potash

From requirements and supply estimates, the world deficit of actual potash is approximately 388,000 metric tons K₂O, which is relatively less than the world deficits of nitrogen and soluble phosphates. Potash production is confined principally to the United States, France, the U.S.S.R., Spain, Palestine, and Germany. Production in France has steadily increased and their export program has been resumed. Under present plans essentially the United States supplies the countries of the Western Hemisphere, and the European producers and Palestine supply the Eastern Hemisphere.

The increase in world potash supply over pre-war 1936-39 average is about 258,000 metric tons K₂O. It is contemplated that 510,000 tons K₂O will be exported from Germany to about 17 different countries. The success of the world potash distribution program depends a great deal on German potash moving to these countries.

years and the demand is still for more potash. In Asia and the Far East the consumption of potash has always been much less, with Japan as the major consumer of about 100,000 metric tons K₂O.

The United States production and consumption have greatly increased. The world supply of potash is approaching the point where the supply is nearly sufficient to meet the world demand provided that German production is maintained and exports from Germany become available to the European countries as planned.

Conclusions

In conclusion, there are four main points to emphasize:

- Because the world-wide demand for fertilizers exceeds the supply, every country that uses fertilizers is experiencing a shortage for 1946-47.
- Due, however, to the cooperation of Governments and industries throughout the

world, no country that has submitted their requirements is going without fertilizer.

3. By far the most severe shortage is nitrogen estimated as equivalent to 4,200,000 metric tons sulphate of ammonia. The world shortages of soluble phosphates and potash are less severe.

4. Four periods of world cooperation has demonstrated to a very large degree what can be done by the people of the world to provide the equitable distribution of fertilizers for food production.

Trona Building New Plant

The American Potash and Chemical Corporation in 1947 will start construction of new plant facilities at Trona, Calif., to increase production of soda ash and borax. The demand for these products has increased greatly during the war. The new plant will increase the company's annual output of soda ash from 80,000 tons to 140,000 tons and of borax from 100,000 tons to 130,000 tons. New improved production methods have been developed by the Company's research and production staff.



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**FERTILIZER SUPPLIES FOR THE U. S.
DURING 1946-47**

(Continued from page 13)

tion of the total domestic potash supply for Period Eight was as follows:

| | Tons (K ₂ O) |
|-------------------------------------|-------------------------|
| Industrial or chemical..... | 65,835 |
| Exports (other than Canada)..... | 14,778 |
| Canada..... | 35,929 |
| U. S. Agriculture (fertilizer)..... | 679,338 |
| Total..... | 795,880 |

Exports of domestic potash approved by the International Emergency Food Council during the current season total 56,100 tons of K₂O as compared with about 64,000 tons last season. By countries the 1946-47 exports are as follows:

| EXPORT ALLOCATIONS FOR 1946-47 | |
|--------------------------------|--------|
| U. S. Potash | Tons |
| Canada..... | 40,900 |
| British West Indies..... | 2,800 |
| New Zealand..... | 1,600 |
| Philippines..... | 200 |
| Latin-American Republics..... | 10,600 |
| Total..... | 56,100 |

Nitrogen

Now for a resume of the nitrogen picture as it appears at present.

While the United States was originally scheduled to obtain about 680,000 tons of nitrogen for agricultural use in 1946-47, a figure approximately the level of the 1945-46 program, recent developments have materially altered the outlook on the basis of estimates made about ten days ago, at which time a cutback of about 30,000 tons of nitrogen appeared likely. However, since that

time, export commitments originally set at 97,000 tons of nitrogen have been reduced to 67,000 tons of nitrogen. The decrease of about 30,000 tons of N from the earlier estimates is a result of curtailed production of synthetic nitrate of soda, a small cut back in fertilizer grade urea, in part compensated by an increase in the amount of nitrogen expected to be available in the form of solutions. A break down of the now estimated supply by major groups of material and the distribution in tentative form is as follows:

NITROGEN SUPPLIES IN SHORT TONS OF N

| | 1946-47 Program |
|--------------------------------------|--------------------|
| U. S. Production | |
| Ammonium Sulphate..... | 143,500 |
| Nitrogen Solutions..... | 195,000 |
| Ammonium Nitrate..... | 159,500 |
| Other Nitrogen Compounds..... | 26,000 |
| Organics..... | 30,000 |
| Domestic Production..... | 554,000 |
| Imports | |
| Chile | |
| Sodium Nitrate..... | 88,000 |
| Canada | |
| Ammonium Sulphate..... | 23,600 |
| Cyanamid..... | 27,300 |
| 11-48 Ammo Phos..... | 2,400 |
| 16-20 Ammo Phos..... | 11,500 |
| Ammonium Nitrate..... | 38,000 |
| Norway | |
| Calcium Nitrate..... | 1,100 |
| Total Imports..... | 191,900 |
| Total U. S. Supply..... | 745,900 |
| Exports Approved by I.E.M.C. | 67,000 |
| Net Supply for U. S. and Possessions | 678,900 |

Nitrogen supply figures do not include materials which the War Department will produce at Ordnance Plants now being reactivated, for shipment to occupied areas of Japan, South Korea and Germany.

Scheduled imports of Chilean nitrate of soda for six months ending December 31, 1946, are approximately one-third of indicated total for 1946-47 season.

This has brought us up to the Army fertilizer program, which in the United States represents the production of ammonium nitrate for shipment to United States occupied zones of Japan, Korea, and Germany. For this program, which envisions the production of 684,000 short tons of material by next August, the Army has reactivated Cactus, Missouri, Morgantown, and Ohio River ammonia plants. Ammonium nitrate solution will be made at the Holston, Indiana, Kankakee, Radford, Sunflower, and Wabash River Ordnance Works. Grained material will be made at the Cornhusker, Illinois, Iowa, Milan, Nebraska, and Ravenna graining plants.

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| Buffalo, N. Y. | Greensboro, N. C. | Pierce, Fla. |
| Cartaret, N. J. | Havana, Cuba | Port Hope, Ont., Can. |
| Cayce, S. C. | Henderson, N. C. | Savannah, Ga. |
| Chambley Canton, Quebec, Can. | Montgomery, Ala. | Searsport, Maine |
| Charleston, S. C. | Nat. Stockyards, Ill. | South Amboy, N. J. |
| Cincinnati, Ohio | Norfolk, Va. | Spartanburg, S. C. |
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| Carteret, N. J. | Havana, Cuba | New York, N. Y. | Spartanburg, S. C. |
| Charleston, S. C. | Henderson, N. C. | Norfolk, Va. | Wilmington, N. C. |
| Cincinnati, Ohio | Houlton, Me. | No. Weymouth, Mass. | |
| Cleveland, Ohio | Laurel, Miss. | Pensacola, Fla. | |



Pending the time these plants in the Army program start operating, the Army is borrowing ammonium nitrate from the domestic commercial supply. For the months of August, September, October, and November this take comprises about 100,000 tons of material. As now contemplated, the Army will not take any ammonium nitrate in December—a final decision on this will be reached November 15th. However, if the Army does not secure any material from commercial sources, an equivalent tonnage (33,000 tons of ammonium nitrate) is scheduled for export against I. E. F. C. allocations, after earmarking 6,000 tons of this quantity for shipment to Puerto Rico.

Under the arrangements with the Army, and according to provisions in the contracts between the Army and the suppliers, the material borrowed this Fall will be returned by the Army out of its own production beginning January 1, 1947, 50 per cent during the first three months and the remaining 50 per cent during April and May.

The Secretary of Agriculture was informed by the Secretary of War, under date of October 16th, that as of that date the War Department envisions no major difficulty in replacing the borrowed tonnage according to schedule. The War Department estimates that production of finished fertilizer grade ammonium nitrate will be 30,000 tons in November; 50,000 tons in December; 75,000 tons in January; 84,000 tons in February; and reaching 88,000 tons per month for March and subsequent months. Now for the sad news. All of the ammonium nitrate to be returned by the Army is scheduled for export during January through April. In addition, 8,000 tons of the domestic supply is scheduled for movement to Puerto Rico. For April through June all but 30,000 tons of ammonium nitrate supply will be retained for United States consumption. Possibly by April some additional productive capacity will come into the picture.

One of the most difficult problems involved in the Army program has been that of tank cars for anhydrous ammonia and ammonium nitrate solutions. It was first proposed that the entire fleet of Army-

owned tank cars of this type under lease to private operators would be recalled.

Through the efforts of the Department of Agriculture, the Civilian Production Administration and others interested, a plan was worked out which materially reduced the extent of the withdrawal of Army-owned cars, and also made possible the set-aside of sufficient acid tank cars for the proposed operations at Alabama Ordnance Works. To do this, the required number of petroleum cars were ordered to be converted to handle ammonium nitrate solutions and acid cars in that service released for acid transportation.

A survey is now being made by the Department of Agriculture to determine in as realistic a manner as possible the probable demand for nitrogen, phosphates and potash for the next several years. This survey will provide a basis for a re-appraisal of production capacity requirements in these several fields.

The fertilizer industry has done a good job under most difficult circumstances during the war years and subsequently.

PAST AND FUTURE

(Continued from page 8)

fluence on our industry for the benefit of all concerned. It is simple, easily understood, and its benefits can be readily measured. It is simply a quotation from the Scriptures: "Do unto others as you would have others do unto you." This applies to customers, employees, producers, and competitors.

When we are confronted with excess production, new markets must be found. Your Association, as in the past, will play an important role in this regard, by continuation of the effort that is so well under way. Because of this, and many other beneficial activities, I hope you will not only continue your splendid support, but also assist the Membership Committee, wherever possible, to the end of substantially increasing the membership in the National Fertilizer Association which now comprises about 430 members.

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Agricultural authorities have shown that a lack of Boron in the soil can result in deficiency diseases which seriously impair the yield and quality of crops.

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Information and references available on request.

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Pioneer Producers of Muriate of Potash in America

See Page 20

Convention Attendance

Members and guests registered at the Southern Convention of the National Fertilizer Association, Atlanta, Ga., November 12 and 13, 1946

- THE AMERICAN FERTILIZER, Philadelphia, Pa.
 S. L. Veitch
 W. J. Kane
 Agricultural Chemicals, New York City
 Wayne E. Dorland
 Alabama Fertilizer Co., Montgomery, Ala.
 M. L. Head
 Albany Warehouse Co., Albany, Ga.
 James P. Champion
 E. T. Allen Co., Atlanta, Ga.
 D. H. Cameron
 American Potash & Chemical Corp., New York City
 E. M. Kolb
 C. L. Straughan, Atlanta, Ga.
 William A. Webster, Chicago, Ill.
 American Shipping & Stevedoring Co., Savannah, Ga.
 J. J. Magee
 Mrs. J. J. Magee
 Americus Oil Co., Americus, Ga.
 R. L. McMath, Jr.
 H. M. Arnold Fertilizer Co., Monroe, Ga.
 H. M. Arnold
 Ashcraft-Wilkinson Co., Atlanta, Ga.
 Les Ashcraft
 Gus H. Ashcraft
 Robert E. Ashcraft, Norfolk, Va.
 Emory Cocke
 R. F. Fraser, Charleston, S. C.
 George W. McCarty
 Trenton Tunnell
 Van W. Wilkinson
 Associated Press, Atlanta, Ga.
 Wm. W. Patterson
 Augusta Fertilizer Works, Augusta, Ga.
 Mark J. Bridges
 Bagpak, Inc., New York City
 Dick Port, Atlanta, Ga.
 Lee Turner, Baltimore, Md.
 Barrett Division, Allied Chemical & Dye Corp., New York City
 C. J. Ball, Norfolk, Va.
 Leroy Donald, Goodman, Miss.
 E. W. Harvey
 L. O. Hinton, Atlanta, Ga.
 Mrs. George W. Leyhe, Atlanta, Ga.
 Roy S. Marsden
 W. H. Mortimer
 Mrs. W. H. Mortimer
 George Suggs, Atlanta, Ga.
 F. T. Techter
 Bemis Bro. Bag Co., St. Louis, Mo.
 W. H. Akins, Memphis, Tenn.
 David Morris, Orlando, Fla.
 R. L. Sherrill, Mobile, Ala.
 David F. Warren, New Orleans, La.
 V. H. Watts, New Orleans, La.
 Blackshear Manufacturing Co., Blackshear, Ga.
 Warren Lott
 Blue Belt Fertilizer Co., Savannah, Ga.
 C. B. Smith
 The Boswell Co., Atlanta, Ga.
 N. E. Boswell
- Bradley & Baker, New York City
 A. B. Baker, Jr.
 John B. Sanford, Jacksonville, Fla.
 Buhner Fertilizer Co., Seymour, Ind.
 R. L. La Croix
 Caldwell & Co., Spartanburg, S. C.
 James B. Caldwell
 Capital Fertilizer Co., Montgomery, Ala.
 E. T. Spidle
 Cartledge Fertilizer Co., Cottontdale, Fla.
 Raymond Cartledge
 Hugh Dukes
 L. H. Facer
 Catawba Fertilizer Co., Lancaster, S. C.
 W. G. Taylor
 Central Chemical Corp. of Md., Hagerstown, Md.
 D. Fred Neikirk
 Chase Bag Co., Chicago, Ill.
 Charles T. Crandall, New Orleans, La.
 Chatham Fertilizer Co., Savannah, Ga.
 George D. Cope
 Chilean Nitrate Sales Corp., New York City
 Fred P. Bryan, Raleigh, N. C.
 Roy F. Camp
 Watts Gunn, Atlanta, Ga.
 W. E. Matthews, Atlanta, Ga.
 H. P. Weston, Jr., Talbotton, Ga.
 Coke Oven Ammonia Research Bureau, Columbus, Ohio
 H. H. Tucker
 Commercial Fertilizer, Atlanta, Ga.
 Virginia Crenshaw
 Bruce Moran
 Commercial Solvents Corp., New York City
 Daniel B. Curril
 The Cotton Producers Association, Atlanta, Ga.
 J. M. Gibson
 J. E. Nunnally
 Cottonseed Crushers Assn., Atlanta, Ga.
 J. E. Moses
 George V. Gaines
 Davison Chemical Corp., Baltimore, Md.
 H. S. Ten Eyck, Bartow, Fla.
 Dolomite Products Co., Ocala, Fla.
 W. M. Palmer
 E. I. Du Pont de Nemours & Co., Wilmington, Del.
 Marion N. Crady, Memphis, Tenn.
 J. H. Daughtridge
 N. A. Hite, Merchantville, N. J.
 J. B. Holmes
 Ove F. Jensen, Chapel Hill, N. C.
 Ward H. Sachs, Orlando, Fla.
 Eagle Cotton Oil Co., Meridian, Miss.
 Webb Brunson
 E. E. Morrison
 Eastern States Farmers Exchange, West Springfield, Mass.
 Jos. A. Chucka
 Ellis Chemical Co., New Albany, Ind.
 Ray C. Ellis
 Epting Distributing Co., Leesville, S. C.
 J. H. Epting
 Mrs. J. H. Epting

CONVENTION ATTENDANCE (Continued)

- Everglades Fertilizer Co., Ft. Lauderdale, Fla.
 John B. Dye, Jr.
- Farmers Cotton Oil Co., Wilson, N. C.
 F. N. Bridgers
 Joe E. Brewer
 T. F. Bridgers
 C. H. Suber, Norfolk, Va.
- Farmers Fertilizer Co., Columbus, Ohio
 S. F. Elwood
- Federal Chemical Co., Louisville, Ky.
 R. M. Acree, Meridian, Miss.
- Fidelity Chemical Corp., Houston, Tex.
 James D. Dawson, Jr.
- Fidelity Products Co., Edison, Ga.
 T. N. Wiggins
- French Potash & Import Co., New York City
 W. B. Howe
- Fulton Bag & Cotton Mills, Atlanta, Ga.
 Roy Gurkin
 J. O. H. Sanders
- Georgia Fertilizer Co., Valdosta, Ga.
 Ray L. King
- A. W. Higgins Co., Presque Isle, Me.
 Paul E. Files
 Mrs. Paul E. Files
 Arthur W. Higgins
 Mrs. Arthur W. Higgins
- Hill & Knowlton, Washington, D. C.
 Bert C. Goss
- Home Guano Co., Mullins, S. C.
 N. Bryant Cooper
- Howe, Inc., Minneapolis, Minn.
 Roy M. Howe
- Hydrocarbon Products Co., New York City
 J. P. Brinton, Jr.
- International Minerals & Chemical Corp., Chicago, Ill.
 Henry C. Aaron, Shreveport, La.
 Mrs. Henry C. Aaron
 J. L. Baskin, Orlando, Fla.
 W. L. Baughcum, East Point, Ga.
 H. B. Baylor
 H. L. Carroll, Augusta, Ga.
 John F. Carroll, Raleigh, N. C.
 J. M. Coppinger
 H. M. Crum, Raleigh, N. C.
 A. B. Cunningham, East Point, Ga.
 C. H. Elrod, Montgomery, Ala.
 B. L. Garrett, Roopville, Ga.
 Marvin Hartley, Davisboro, Ga.
 J. C. Huie, Albany, Ga.
 A. Norman Into
 S. T. Keel
 B. E. Megushar
 G. W. Moyers
 J. Rucker McCarty, East Point, Ga.
 Eloise Nelson, East Point, Ga.
 J. W. Rutland, Atlanta, Ga.
 George V. Savitz, New York City
 Joe F. Stough
 Henry L. Taylor, Jr., New York City
- Jackson Fertilizer Co., Jackson, Miss.
 A. A. Green
 C. B. Morton
- Johnson Cotton Co., Dunn, N. C.
 Wm. J. Thompson
- Kelly-Weber & Co., Lake Charles, La.
 G. A. Foss
 Floyd J. Vincent
- Kershaw Oil Mill, Kershaw, S. C.
 T. V. Hough
- Knoxville Fertilizer Co., Knoxville, Tenn.
 J. C. Dean
 James W. Dean
 Mrs. James W. Dean
 H. E. Hendricks
 Newt Myers
 Lange Bros., Ltd., St. Louis, Mo.
 Dewey K. Lange
 Lion Oil Company, El Dorado, Ark.
 Guy S. Mitchell
 Henry L. Taylor, Sr.
 J. W. Looper, Dalton, Ga.
 Louisiana Agricultural Supply Co., Baton Rouge, La.
 W. F. Williamson
 Alex M. McIver & Son, Charleston, S. C.
 Alex M. McIver
 H. Howard McIver
 Meridian Fertilizer Factory, Hattiesburg, Miss.
 M. G. Field
 Miami Fertilizer Co., Dayton, Ohio
 Charles F. Martin
 C. R. Martin
 Millen Fertilizer Co., Millen, Ga.
 E. M. Thorne
 Miller Bros. Company, Jefferson, S. C.
 J. C. Miller
 Miller Chemical & Fertilizer Co., Baltimore, Md.
 L. W. Cameron
 J. A. & A. S. Mills, Sylvania, Ga.
 J. P. Evans
 Alex Mills
 Mutual Fertilizer Co., Savannah, Ga.
 Charles Ellis, Jr.
 V. W. Norris & Son, Rushville, Ind.
 Alfred Norris
 C. W. Timmons
 North American Fertilizer Co., Louisville, Ky.
 T. W. Crady
 Walter Crady
 Oil, Paint & Drug Reporter, New York City
 Hugh Craig
 Old Deerfield Fertilizer Co., South Deerfield, Mass.
 E. S. Russell
 Pacific Guano Co., Berkeley, Calif.
 Weller Noble
 Pelham Phosphate Co., Pelham, Ga.
 L. D. Hand
 Pendleton Oil Mill, Pendleton, S. C.
 E. N. Sitton
 Pioneer Phosphate & Fertilizer Co., Des Moines, Iowa
 John L. Sloane
 Potash Co. of America, New York City
 W. H. Appleton, Montgomery, Ala.
 Paul C. Ausley, Atlanta, Ga.
 Tobe Bradley, Peoria, Ill.
 C. M. Harris
 C. E. Lightfoot
 Jas. R. Mell, Atlanta, Ga.
 F. Edward Smith, Jr., Baltimore, Md.
 Price Chemical Co., Louisville, Ky.
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 W. M. Newman
 Raymond Bag Co., Middletown, Ohio
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 Co., Chicago, Ill.
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| Mrs. Burton A. Ford | Nicolay Titlestad |
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| C. C. Keefer, Louisville, Ky. | T. V. A., Knoxville, Tenn. |
| Jim Weldon, Atlanta, Ga. | George W. McIntosh |
| Shrock Fertilizer Service, Congerville, Ill. | N. Wengert |
| J. B. Shrock | Union Special Machine Co., Chicago, Ill. |
| Shepard Fertilizer Co., Moultrie, Ga. | Travis S. Whitsel |
| W. E. Shepard | Mrs. Travis S. Whitsel |
| Shreveport Fertilizer Works, Shreveport, La. | U. S. Potash Co., New York City |
| C. D. Shallenberger | J. E. Barnes |
| Mrs. C. D. Shallenberger | L. Ralph Boynton, Atlanta, Ga. |
| Shuey & Co., Inc., Savannah, Ga. | B. A. Crady, Meridian, Miss. |
| Philip McG. Shuey | Dean R. Gidney |
| Smith Agricultural Chemical Co., Columbus, Ohio | C. E. Littlejohn, Columbus, Ohio |
| John E. Powell | The Utility Works, East Point, Ga. |
| C. S. Schmelzer | E. K. Thomason |
| C. E. Vetti | Victor Fertilizer Co., Chester, S. C. |
| Soperton Guano Co., Soperton, Ga. | R. A. Oliphant |
| J. E. Hall | Weil's Fertilizer Works, Goldsboro, N. C. |
| J. E. Hall, Jr. | Lionel Weil |
| Southern Agricultural Fertilizer Co., Clarksdale, Miss. | Edward A. Werner, Atlanta, Ga. |
| Kinchen O'Keefe | Werthan Bag Corp., Atlanta, Ga. |
| Howard Wiggins | Harold D. Holsombach |
| Southern Cotton Oil Co., New Orleans, La. | Mrs. Harold D. Holsombach |
| Leon H. Davis | Woodward Bag Co., Augusta, Ga. |
| Martin L. Hallman, Montgomery, Ala. | C. La Fayette Woodward |
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| J. J. Moore, Atlanta, Ga. | Woodward & Dickerson, Inc., Philadelphia, Pa. |
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| S. W. Draper | |
| Spencer Chemical Co., Kansas City, Mo. | National Fertilizer Association, Washington, D. C. |
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| Sturtevant Mill Co., Boston, Mass. | W. E. Chace |
| John C. Mooar | Robert H. Engle |
| Summers Fertilizer Co., Baltimore, Md. | R. H. Lush |
| James E. Totman | Wm. S. Ritnour |
| Swift & Co., Plant Food Division, Chicago, Ill. | |
| J. W. Cooper, Atlanta, Ga. | Guests |
| O. D. Culpepper, Albany, Ga. | L. D. Bauer, North Carolina State College, Raleigh, |
| A. B. Everett, Columbia, S. C. | N. C. |
| E. H. Fricks, Atlanta, Ga. | B. D. Cloaninger, Clemson A. & M. College, Clemson, |
| E. Groenstein, Atlanta, Ga. | S. C. |
| J. E. Henkel | W. O. Collins, University of Georgia, Athens, Ga. |
| W. L. Hunnicutt, Atlanta, Ga. | H. P. Cooper, S. C. Agric. Experiment Station, Clem- |
| W. O. Jones, Atlanta, Ga. | son, S. C. |
| E. O. Kintzing | M. J. Funchess, Ala. Agric. Experiment Station, |
| Howard D. Meyer, Atlanta, Ga. | Auburn, Ala. |
| A. F. Miller | M. Keim, C.P.A., Washington, D. C. |
| C. T. Prindeville | W. C. Lassetter, <i>The Progressive Farmer</i> , Memphis, |
| Paul Reynolds, Savannah, Ga. | Tenn. |
| Sylacauga Fertilizer Co., Sylacauga, Ala. | Oliver E. Overseth, Int. Emergency Food Council, |
| Harry Appleby | United Nations, Washington, D. C. |
| H. A. Parker | L. G. Porter, U. S. Dept. of Agriculture, Washington, |
| Synthetic Nitrogen Products Corp., New York City | D. C. |
| Walter Applewhite, Moultrie, Ga. | T. M. Healy, Assn. of American Railroads |
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Hydrocarbon Products Co., New York City.
Spencer Chemical Co., Kansas City, Mo.

AMMONIUM NITRATE

Spencer Chemical Co., Kansas City, Mo.

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Bemis Bro. Bag Co., St. Louis, Mo.
Chase Bag Co., Chicago, Ill.
Fulton Bag & Cotton Mills, Atlanta, Ga.
Mente & Co., Inc., New Orleans, La.
Virginia-Carolina Chemical Corp., Richmond, Va.

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Chase Bag Co., Chicago, Ill.
Fulton Bag & Cotton Mills, Atlanta, Ga.
Mente & Co., Inc., New Orleans, La.
Virginia-Carolina Chemical Corp., Richmond, Va.

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Chase Bag Co., Chicago, Ill.
Fulton Bag & Cotton Mills, Atlanta, Ga.
Hammond Bag & Paper Co., Weisburg, W. Va.
Jaite Company, The, Jaite, Ohio
Raymond Bag Co., Middletown, Ohio.
St. Regis Paper Co., New York City.

BAGS—Dealers and Brokers

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Huber & Company, New York City.
McIver & Son, Alex. M., Charleston, S. C.

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BAG PRINTING MACHINES

Schmutz Mfg. Co., Louisville, Ky.

BAGGING MACHINES—For Filling Sacks

Exact Weight Scale Co., Columbus, Ohio
St. Regis Paper Co., New York City.
Sackett & Sons Co., The A. J., Baltimore, Md.
Utility Works, The, East Point, Ga.

BONE BLACK

American Agricultural Chemical Co., New York City.
Armour Fertilizer Works, Atlanta, Ga.
Huber & Company, New York City.

BONE PRODUCTS

American Agricultural Chemical Co., New York City.
Armour Fertilizer Works, Atlanta, Ga.
Ashcraft-Wilkinson Co., Atlanta, Ga.
Baker & Bro., H. J., New York City.
Bradley & Baker, New York City.
Huber & Company, New York City.
McIver & Son, Alex. M., Charleston, S. C.
Scar-Lipman & Co., Inc., New York City.
Schmalz, Jos. H., Chicago, Ill.

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Bradley & Baker, New York City.
Huber & Company, New York City.
Keim, Samuel D., Philadelphia, Pa.
McIver & Son, Alex. M., Charleston, S. C.
Scar-Lipman & Co., Inc., New York City.
Schmalz, Jos. H., Chicago, Ill.

BUCKETS—For Hoists, Cranes, etc.

Hayward Company, The, New York City.

BUCKETS—Elevator

Sackett & Sons Co., The A. J., Baltimore, Md.
Stedman's Foundry and Mach. Works, Aurora, Ind.

CARS AND CARTS

Hough Co., The Frank G., Libertyville, Ill.
Sackett & Sons Co., The A. J., Baltimore, Md.
Stedman's Foundry and Mach. Works, Aurora, Ind.
Utility Works, The, East Point, Ga.

CHEMICALS

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Armour Fertilizer Works, Atlanta, Ga.
Ashcraft-Wilkinson Co., Atlanta, Ga.
Baker & Bro., H. J., New York City.
Bradley & Baker, New York City.
DuPont de Nemours & Co., E. I., Wilmington, Del.
Huber & Company, New York City.
International Minerals & Chemical Corporation, Chicago, Ill.
McIver & Son, Alex. M., Charleston, S. C.
Scar-Lipman & Co., Inc., New York City.
Virginia-Carolina Chemical Corp., Richmond, Va.

CHEMISTS AND ASSAYERS

Gascoyne & Co., Baltimore, Md.
Shuey & Company, Inc., Savannah, Ga.
Wiley & Company, Baltimore, Md.

CONDITIONERS

American Limestone Co., Knoxville, Tenn.
Keim, Samuel D., Philadelphia, Pa.

COTTONSEED PRODUCTS

Ashcraft-Wilkinson Co., Atlanta, Ga.
Baker & Bro., H. J., New York City.
Bradley & Baker, New York City.
Huber & Company, New York City.
McIver & Son, Alex. M., Charleston, S. C.
Scar-Lipman & Co., Inc., New York City.
Schmalz, Jos. H., Chicago, Ill.

CYANAMID

American Agricultural Chemical Co., New York City.
Ashcraft-Wilkinson Co., Atlanta, Ga.
Baker & Bro., H. J., New York City.
Bradley & Baker, New York City.
Scar-Lipman & Co., Inc., New York City.

DRYERS

Sackett & Sons Co., The A. J., Baltimore, Md.

ENGINEERS—Chemical and Industrial

Chemical Construction Corp., New York City.
Sackett & Sons Co., The A. J., Baltimore, Md.
Stedman's Foundry and Mach. Works, Aurora, Ind.
Titlested Corporation, Nicolay, New York City.

FERTILIZER (Mixed) MANUFACTURERS

American Agricultural Chemical Co., New York City.
Armour Fertilizer Works, Atlanta, Ga.
International Minerals and Chemical Corporation, Chicago, Ill.
Virginia-Carolina Chemical Corp., Richmond, Va.

FISH SCRAP AND OIL

Ashcraft-Wilkinson Co., Atlanta, Ga.
Baker & Bro., H. J., New York City.
Bradley & Baker, New York City.
Huber & Company, New York City.
McIver & Son, Alex. M., Charleston, S. C.
Scar-Lipman & Co., Inc., New York City.

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Stedman's Foundry and Mach. Works, Aurora, Ind.
Utility Works, The, East Point, Ga.

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BUYERS' GUIDE

For an Alphabetical List of all the
Advertisers, see page 33

HOPPERS

Sackett & Sons Co., The A. J., Baltimore, Md.
Stedman's Foundry and Mach. Works, Aurora, Ind.
Utility Works, The, East Point, Ga.

IMPORTERS, EXPORTERS

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Ashcraft-Wilkinson Co., Atlanta, Ga.
Baker & Bro., H. J., New York City.
Bradley & Baker, New York City.
Scar-Lipman & Co., Inc., New York City.

INSECTICIDES

American Agricultural Chemical Co., New York City.
McLaughlin Gormley King Co., Minneapolis, Minn.

LIMESTONE

American Agricultural Chemical Co., New York City.
American Limestone Co., Knoxville, Tenn.
Ashcraft-Wilkinson Co., Atlanta, Ga.
Bradley & Baker, New York City.
McIver & Son, Alex. M., Charleston, S. C.
Scar-Lipman & Co., Inc., New York City.

LOADERS—Car and Wagon

Hough Co., The Frank G., Libertyville, Ill.
Sackett & Sons Co., The A. J., Baltimore, Md.

MACHINERY—Acid Making and Handling

Chemical Construction Corp., New York City.
Monarch Mfg. Works, Inc., Philadelphia, Pa.
Sackett & Sons Co., The A. J., Baltimore, Md.
Stedman's Foundry and Mach. Works, Aurora, Ind.
Utility Works, The, East Point, Ga.

MACHINERY—Ammoniating

Sackett & Sons Co., The A. J., Baltimore, Md.

MACHINERY—Elevating and Conveying

Hough Co., The Frank G., Libertyville, Ill.
Hayward Company, The, New York City.
Sackett & Sons Co., The A. J., Baltimore, Md.
Stedman's Foundry and Mach. Works, Aurora, Ind.
Utility Works, The, East Point, Ga.

MACHINERY—Grinding and Pulverizing

Bradley Pulverizer Co., Allentown, Pa.
Sackett & Sons Co., The A. J., Baltimore, Md.
Sedberry, Inc. J. B., Franklin, Tenn. and Utica, N. Y.
Stedman's Foundry and Mach. Works, Aurora, Ind.
Utility Works, The, East Point, Ga.

MACHINERY—Material Handling

Hayward Company, The, New York City.
Hough Co., The Frank G., Libertyville, Ill.
Sackett & Sons Co., The A. J., Baltimore, Md.
Stedman's Foundry and Mach. Works, Aurora, Ind.
Utility Works, The, East Point, Ga.

MACHINERY—Mixing, Screening and Bagging

Exact Weight Scale Co., Columbus, Ohio
Sackett & Sons Co., The A. J., Baltimore, Md.
Stedman's Foundry and Mach. Works, Aurora, Ind.
Utility Works, The, East Point, Ga.

MACHINERY—Power Transmission

Sackett & Sons Co., The A. J., Baltimore, Md.
Stedman's Foundry and Mach. Works, Aurora, Ind.

MACHINERY—Superphosphate Manufacturing

Sackett & Sons Co., The A. J., Baltimore, Md.
Stedman's Foundry and Mach. Works, Aurora, Ind.
Utility Works, The, East Point, Ga.

MANGANESE SULPHATE

McIver & Son, Alex. M., Charleston, S. C.
Tennessee Corporation, Atlanta, Ga.

MIXERS

Sackett & Sons Co., The A. J., Baltimore, Md.
Stedman's Foundry and Mach. Works, Aurora, Ind.
Utility Works, The, East Point, Ga.

NITRATE OF SODA

American Agricultural Chemical Co., New York City.
Armour Fertilizer Works, Atlanta, Ga.
Ashcraft-Wilkinson Co., Atlanta, Ga.
Baker & Bro., H. J., New York City
Bradley & Baker, New York City.

NITRATE OF SODA—Continued

Huber & Company, New York City.
International Minerals & Chemical Corporation, Chicago, Ill.
McIver & Son, Alex. M., Charleston, S. C.
Scar-Lipman & Co., Inc., New York City.
Schmaltz, Jos. H., Chicago, Ill.

NITROGENOUS ORGANIC MATERIAL

American Agricultural Chemical Co., New York City.
Armour Fertilizer Works, Atlanta, Ga.
Ashcraft-Wilkinson Co., Atlanta, Ga.
Baker & Bro., H. J., New York City.
Bradley & Baker, New York City.
DuPont de Nemours & Co., Wilmington, Del.
Huber & Company, New York City.
International Minerals & Chemical Corporation, Chicago, Ill.
McIver & Son, Alex. M., Charleston, S. C.
Scar-Lipman & Co., Inc., New York City.

NOZZLES—Spray

Monarch Mfg. Works, Philadelphia, Pa.

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American Agricultural Chemical Co., New York City.
Armour Fertilizer Works, Atlanta, Ga.
Ashcraft-Wilkinson Co., Atlanta, Ga.
Baker & Bro., H. J., New York City.
Bradley & Baker, New York City.
Huber & Company, New York City.
International Minerals & Chemical Corporation, Chicago, Ill.
McIver & Son, Alex. M., Charleston, S. C.
Ruhm, H. D., Mount Pleasant, Tenn.
Scar-Lipman & Co., Inc., New York City.
Schmaltz, Jos. H., Chicago, Ill.
Virginia-Carolina Chemical Corp., Richmond, Va.

PLANT CONSTRUCTION—Fertilizer and Acid

Chemical Construction Corp., New York City.
Sackett & Sons Co., The A. J., Baltimore, Md.
Stedman's Foundry and Mach. Works, Aurora, Ind.
Titlestad Corporation, Nicolay, New York City.
Utility Works, The, East Point, Ga.

POTASH SALTS—Dealers and Brokers

American Agricultural Chemical Co., New York City.
Armour Fertilizer Works, Atlanta, Ga.
Ashcraft-Wilkinson Co., Atlanta, Ga.
Baker & Bro., H. J., New York City.
Bradley & Baker, New York City.
Huber & Company, New York City.
International Minerals & Chemical Corporation, Chicago, Ill.
Scar-Lipman & Co., Inc., New York City.
Schmaltz, Jos. H., Chicago, Ill.

POTASH SALTS—Manufacturers

American Potash and Chem. Corp., New York City.
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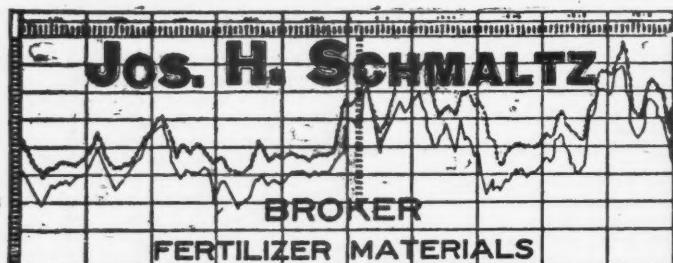
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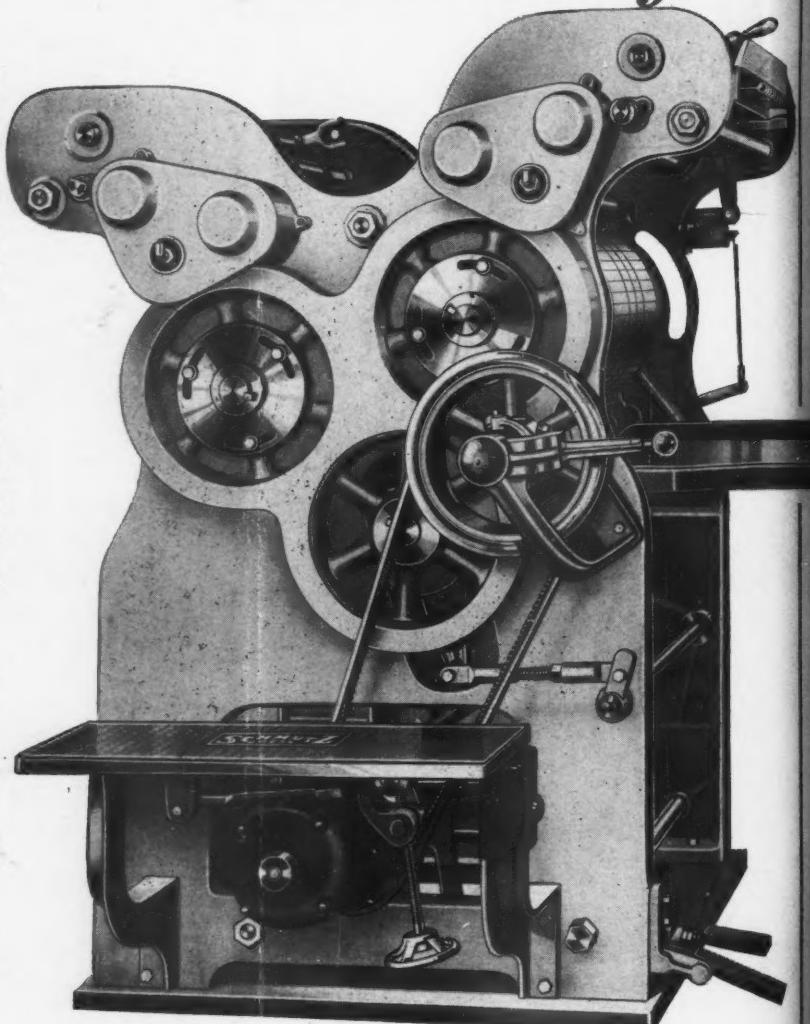
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